AUTHORIZATION for APPROVAL or SECURITY REQUEST INSTRUCTIONS

Rev: 08/21/2008

PURPOSE

The purpose of this form is to identify those employees who will act as security requestors for a state agency or to approve personnel and/or payroll transactions or to request access for their agency. These security requestors are selected by the agency director or elected official to either request security changes for their agency or to approve personnel and/or payroll transactions for their agency. A few agencies may have an employee from another agency perform these functions for them.

Each agency may have one or more employees authorized to convey their agency's access/approval needs to the State Controller's Office for different applications. Each selected employee must have a form filled out for him or her. If the employee will be the security contact or personnel/payroll approver for another agency, an *additional form* must be filled out for that agency.

OVERVIEW

The Authorization for Approval or Security Request form is divided into three sections.

Section 1 is the agency's contact person. This employee is in charge of getting the form filled out and is the person you want us to contact if we have any questions about the form.

Section 2 is the employee authorized to request secure access (web / mainframe), approve documents or receive access. Either the employee or the agency contact person may complete this section, but the "Signature" must be the signature of the employee.

Use action code "**A**" (add) when establishing a new security requestor for the first time. In the place provided indicate all of the authorization codes that apply to the new employee.

Use action code "**C**" (change) when modifying any Authorization Code(s) previously established for an employee. Under comments, please state which code is to be added and/or removed for the employee.

Use action code "**D**" (delete) to delete the employee as a security requestor from your agency. Do not use action code "D" to modify an ongoing security requestor's authorizations.

Section 3 is the legal authorization for the approval or security request by the agency director or elected official. If the "Agency Director or Elected Official" has authorized someone else to sign for him/her, this employee may use his or her authorized "Signed-By" signature here in place of the Agency Director or Elected Official's actual signature.

IMPORTANT NOTE

The "Authorization Codes" in Section 1 are separated into three areas:
1) Accounting Security Requestor, 2) Payroll/personnel Approval and 3) Other Security Requestor.

- The "Accounting Security Requestor" and the "Other Security Requestor" codes indicate the authorized employee *can request* access as designated by the code(s) for any employee within their own agency.

- The "Payroll/Personnel Approval" codes indicate the authorized employee *is* the Payroll/Personnel Approver (Signer.)

INSTRUCTIONS TO COMPLETE FORM

Please use blue or black ink to complete the Authorization for Approval or Security Request form.

Section 1

Contact Name – Enter the name of the person who should be contacted in case there are questions about the content of the form.

Phone – Enter the Contact Name's phone number.

Date – Enter the effective date for this form to become active.

Agency Name – Enter the agency name for which the employee will be requesting security access and/or approving documents.

Agency Number – Enter the 3-digit agency number corresponding to the agency name.

Agency Address – Enter the agency's address.

Action Codes – This box cites the appropriate action desired for the authorization codes that follow.
  A (Add) indicates you need to add a new employee authorized to request security access or to approve documents for the web and/or the mainframe.
  C (Change) indicates you need to change the authorization codes on an existing employee.
  D (Delete) indicates you need to delete an employee.

Authorization Codes – This box lists the application(s) that is/are being requested or granted for the employee on the form as explained below:

  Accounting Security Requestor – Selections within the SCO accounting department requiring pre-authorization to access or use:
    1. 1099 –1099 Reporting System (read only access allowed)
    2. FAS – Fixed Asset System
    3. P-Card – Purchasing card Accounting Web Application
    4. STARS – Statewide Accounting and Reporting System
    5. Travel Express – Travel Reimbursement Web Application
    6. All Codes of Accounting, 1 through 6
    7. IBIS – STARS Data

  Payroll / Personnel Approval - Authorizes signer(s) to approve the following:
    9. Payroll Reporting Access Administrator (Maintain User) – Will have the authority to add or delete users with "View" access. An e-mail will be sent from DSPHelp which will give report selections that should be available for the employee. Use this link for documentation for Agency Administrator – Level one user.
    10. EIS Online Inquiry – Access to the payroll / personnel screens on the mainframe (NATP). This can also be done by emailing dspsecurity@sco.idaho.gov to request access.
    11. * Payroll Signer - Authorized Payroll and termination signer in IPOPS, and for any remaining paper forms.
    12. * Personnel Signer –Authorized Personnel signer in IPOPS, and for any remaining paper forms.

13. ***** Position Control Signer –Authorized Position control signer in IPOPS, and for any remaining paper forms.

14. I-Time CPO – Authorization for I-Time Payroll Processing

15. Signed By –This employee can sign on behalf of another (usually the agency director or elected official) using the latter's name by means of a pre-approved signature, such as a handwritten signature, initials, stamp or electronic signature.

16. IPOPS Statewide Approval – Specific agencies that approve IPOPS transactions at a statewide level (BOE, DFM, DHR and GOV).

17. IBIS – Non-confidential – Information in the Employee Information System

18. IBIS – Confidential – Confidential information in the Employee Information System (Home Address and partial SSN).

19. IBIS – Earnings – Confidential information relating to employee earnings.

20. IBIS – Deductions – Confidential information relating to employee deductions.

*For internal control we recommend that this user not have the dual role of being an originator and an authorized signer in IPOPS. For access to IPOPS an IPOPS USER ACCESS Update form also needs to be completed. This form can be found on the SCO Website under Payroll Information.

Other Security Requestor - Authorizes select agency representative(s) to request mainframe security:

21. Misc. Mainframe Access (including FTP) –This employee can request changes for anyone within their agency to access CICS, TSO, FTP and miscellaneous resource access within their scope. NOTE: In most cases when requested, user ID's will be created, modified, and/or deleted by the SCO accounting or payroll administrator who is the application owner.

22. Web Security Only – Has the ability to reset passwords for employees who use the SCO web applications. (Pay stubs, I-Time, IPOPS, Surplus Property, Travel Express and On-line Reporting)

23. Surplus Property Declaration – This employee can access the Board of Examiners' Surplus Property Declaration Form on-line and declare state-owned personal property as surplus to an agency.

24. All Codes of Other Security Requestor, 22 through 24.

Section 2

Enter Action Code – Enter the Action Code letter selected from the Action Codes list.

Employee Authorized to Request Secure Access (web/mainframe) or Approve Payroll/Personnel Documents

Print Name: Print the Employee's name.

Position Title: Print the Employee's position Title.

Phone: Enter the Employee's phone number.

e-mail: Enter the Employee's e-mail address.

Signature: Have the Employee sign this form.

NOTE: If Authorization Code 17(Signed by) *is selected,* <u>print</u> the employee's name, telephone number and e-mail address on the form. Then, have the employee sign the "signature field" with his/her "*<u>customary signature</u>*" of the person for whom the employee is authorized to sign in behalf of (usually the agency director or elected official) <u>instead</u> of the employee's own signature. If applicable cite any notations, such as initials, in the "signature field".

    Example 1: KEVIN JONES BY PATRICIA RAY

    Example 2: KEVIN JONES BY PR

Enter Authorization Code(S) – Enter the Authorization Code number(s) selected from the Authorization Codes lists.

Comments – Enter any applicable comments to further explain the access or approval requests for this employee.

<u>Section 3</u>

Approved By: - The director or elected official of the agency or his/her designee, as the "Signed By" signature, must sign the form here. However, if this form *is authorizing a* "Signed-By" signature, the agency director or elected official ***<u>MUST</u>*** sign the form.

Date – Enter the date the form was signed by the agency director or elected official or designee as "Approved-By" signature.

<u>Please send the completed form to:</u>
Fax: 208-334-2671
or
Mail:
       Office of the State Controller
       5th Floor Administration
       P.O. Box 83720-0011
       Boise, ID 83720-0011

<u>Contacts:</u>

DSPSecurity@sco.idaho.gov   phone: 208-334-3100
STARS_security@sco.idaho.gov   phone: 208-334-3150
SCOHELPDESK@sco.idaho.gov   phone: 208-334-4808